Project Managers' Advisory Group

MINUTES
February 21, 2011

Attending: (* = by phone)

Bob Giannuzzi	EPMO
Kathy Bromead	EPMO
Charles Richards	EPMO
Jesus Lopez	EPMO
Valerie Maat*	EPMO
Alisa Cutler*	EPMO
Linda Lowe*	EPMO
Lucy Cornelius	DPI
Sara Carter	DOT
Cary White	UNC
Dave Butts*	WRC
John O'Shaughnessy*	ITS
Barbara Swartz*	DHHS DPH
Jim Finley*	DHHS DPH
Ellen Zimmerman*	DHHS DPH
Gary Lapio*	DHHS DIRM
Karen Guy*	DHHS DIRM
Deanna Perry*	DHHS DIRM
Subhapratha Sridharan*	DHHS DIRM
Mark Massengill*	DHHS DMA
Sarah Joyner*	ESC
Jodi Bone*	ESC
Lloyd Slominsky*	Dept. of Corrections
Cheryl Ritter*	DOT
Chris Cline*	NCCCS
Colleen McCarthy*	SOS

Bob Giannuzzi welcomed everyone to the meeting.   Subhapratha Sridharan, Mark Massengill, and Cary White were introduced as first time attendees.

Bob solicited and received approval of the January minutes.

Jesus Lopez announced that the EPMO will conduct PMP Exam Prep Class Cycle 12 commencing with the Kickoff session on April 5. The class roster was slated to be selected the following week. This class will be advised to sit for the exam by 8/31, after which the new criteria applied will impact about 30% of the questions.

Jesus then presented an overview to the previous class' survey results. The outcome was quite favorable (third highest overall rating). He also individually recognized each of the current class instructors (all PMPs) for their service and dedication to the program. He pointed out that over the entire history of the class, about 90% of the students passed the exam on the first attempt.

Kathy Bromead reviewed the Process for IT Projects with RFP Solicitation document developed by her work group. It will be available as a Best Practice on the EPMO website at http://www.epmo.scio.nc.gov/ProjectManagementBestPractices/default.aspx.

Bob again reminded the group of free webinars (PDUs) available through the various PMI Communities of Practice (COPs) available to members only. The New Practitioners CoP should be of particular interest to those seeking their PMP. The group was also reminded that PMI is changing PDU categories effective March 1.

Bob reported the following upcoming events at NCPMI and PMI webinars (since updated):

NCPMI Venue	Speaker	Date/Topic
General Membership	Sandy Costa	March 24 (6:00 PM) Humanity at Work: Encouraging Spirit, Achievement and Truth to Flourish in the Workplace
Public Sector LIG	David Reavis	March 3 (6:00 PM) PCI Compliance in State Government
PMO Committee	Bill Stewart	March 23 (6:00 PM) Traits of Great Project Managers and Great PMO's and How to Sell Their Value
Leadership Committee		No meeting scheduled
Information Systems Committee		No meeting scheduled
Free Webinar (must subscribe to I.S. CoP)	Professor Hubert Vaughan	March 2 (noon – 1:00 PM) Keeping Up Our PM Practices With Time and Project Nature
Free Webinar (must subscribe to Project Risk Management CoP)	David Hillson	March 3 (noon – 1:30 PM) Managing risk in projects: What's new?

The progress of the EPMO work groups was discussed next.
- **SDLC** to address integration of alternate SDLCs (e.g., Agile) into the current process/workflow. Kathy reported that the group, in recognizing how radically different Agile is from waterfall, is looking to propose a separate PPM workflow for Agile.
- **Agency Procurement** to develop a common (within agency) procurement process. See above.
- **Business Case** to develop guidelines and provide training on justifying projects based on cost/benefits analysis. Bob reported that the group is making progress on developing user friendly cost/benefit analysis templates.

Alisa Cutler reported on Methodology Task Group activity. She reported that the current focus is on modifying the current RACI template => RASCI, with separate tabs for RACI and Roles and Responsibilities. Work will then continue on updating the O&M Transition Plan documentation and developing a DR checklist.

Charles Richards announced upcoming AdobeConnect training sessions:
- 3/15   CR
- 3/29   Status Reporting
- April   New User

Charles reported that old unfunded Expansion Budget Requests will be deleted from the PPM Portfolio.

Kathy pointed out that a number of documents have been added to the EPMO Website Hot Topics list, including the recent IT Duplication and Legacy Application reports and PMI's announcement of the PMP exam change effective 8/31.

Kathy advised that the EPMO Value Proposition document is under review and should be available for presentation at next month's meeting.

Lessons Learned from recently closed projects are included in the Appendix.

Meeting adjourned at 4:45 PM.

NEXT MEETING

Monday, March 21, 2011 at 3:30
333 Six Forks Road Conference Room 5 or (919) 981-5581

https://its.ncgovconnect.com/r96139571/

APPENDIX

Lessons Learned Documentation

Exhibit A

CCPS - TERRMS – Training & Evaluation Registration & Reports Management System

Initiation Phase:

Topic	Lessons Learned
1. Level 1 Budget	It was difficult to estimate budget prior to receiving proposals from vendors.
2. Project Approval Process	We assumed that since the project was below $500,000, the approval process would be quick. It turned out not to be.
3. Other	It would have been helpful to have a complete understanding of the ITS' internal approval process of projects under $500,000. The approval process took more than a year before we could submit RFPs.

Execution & Build Phase:

Topic	Lessons Learned
1. Updated Business Case	Upon award of the contract, we met with the vendor and created a Requirements Specification document. It defined expectations clearly and was extremely helpful to attain our business requirements.
2. Project Communication	We had weekly status meetings with the vendor to discuss and document progress. It would have been helpful to utilize a web based system (e.g. SharePoint) to capture lessons learned along the way.
3. Testing (test execution, verification & validation, test scripts, test cases)	The vendor did a very good job in implementing the test system for us.
4. Hosting Provider (setting up environments)	The utilization of a virtual server was extremely helpful.

Implementation Phase:

Topic	Lessons Learned
1. Project Schedule / Milestones / Project Planning	The project schedule was extended multiple times because we were at the mercy of another state agency – NC Community College System. They were implementing a new total business solution which had to be done prior to integration with TERMS.
2. Project Cost vs. Budget Cost	We prepared the budget input in UMT based on available budget prior to accepting proposals from vendors. However, our available budget was $300,000 (including 5 year maintenance) when we were developing the Project Charter, and we assumed that we had been approved for that amount. Besides, the vendor increased the O&M cost in the best and Final Offer (BAFO).

Exhibit B

NCIC - Data Management

General Comments:

February 10, 2011	The following lessons learned were compiled from a formal lessons learned session conducted after implementation was complete – The project team adopted an agile approach for development and implementation. The session feedback has been mapped to various phases.

Initiation Phase:

Topic	Lessons Learned
1. Project Approval Process	Get SMEs assigned from user community – positive

Planning & Design Phase:

Topic	Lessons Learned
1. Managing Customer Expectations	Create requirements and work with those; Document process flow (current) and future - Business analyst needs to devote time to observations of current process; Create written requirements (at least higher level) – positive
2. Staffing Plan	Get users (variety of users needed) involved right at beginning and keep them involved; Up front commitment/agreement in writing about end user time commitment; get dedicated team members that can get involved on issues at a moment's notice; Get SME(s) from business at beginning with ample time to do the job; Use the end-users time wisely – Positive & Negative
3. Project Schedule / Milestones / Project Planning	Design/develop in end-user meaningful blocks/units; Get user's sign off at intervals, not just end – positive & negative
4. Requirements Mapping	More time in the beginning to capture understanding of the business process; Develop a requirements process with the development process – negative
5. Other	Application in smaller chunks; Avoid rushing – negative

Execution & Build Phase:

Topic	Lessons Learned
1. Project Approval Process	Process – moved from agile to iterative, to get it out; Never really figured out process – negative
2. Managing Customer Expectations	Bite off smaller chunk – negative
3. Project Schedule / Milestones / Project Planning	Time cannot slip; Underestimated how much time it would take and we didn't have a handle on estimating as needed - A more complete object model needed up front; Better estimating (conservative, not aggressive – smaller chunks); More steps in process; Integrate testing (and response there to) into development cycle – positive & negative
4. Resource Management (internal & external resources)	We didn't have the team resources we needed in beginning; Illness with small team; People resource limited – cross training; Dedicate end user involvement – negative
5. Project Communication	Meetings right amount of time spent; Wiki useful to share info – positive
6. Change Management / Change Request	Estimation process – uncomfortable – negative
7. Development / Build	The Mainframe is challenging to interpret and interact with; Underestimated how wrong carrier data is - Felt helpless with issues; Order of development - - key functionality left to end of development cycles; Develop a development process; Development with end user involved in mind; Screens don't' look like forms; Estimating – negative

	Topic	Lessons Learned
8.	Testing (test execution, verification & validation, test scripts, test cases)	Bugzilla took a while to get comfortable; Bugzilla – love it, immediate feedback; Stronger commitment or greater value placed upon user-acceptance testing; Better iterative test and fix (build into cycles) - More intentional time for adaptation- Positive & negative
9.	Requirements Verification & Validation	Decide on process and stick with it; Make sure everyone understands and buys into the process; We failed to understand/comprehend the complexity of the different forms and the paths they take; We picked the wrong objects as our starter objects – negative
10.	Hosting Provider (setting up environments)	Hosting at ITS; Able to develop technical environment – positive
11.	Backup / DR Strategy	ITS hosting – pending validation of Recovery – positive

Implementation Phase:

Topic	Lessons Learned
3. Managing Customer Expectations	We did a good job with implementation- positive
4. Issue Management	We overcome obstacles; we worked well as a team – positive
5. Project Schedule / Milestones / Project Planning	Smaller increment of code release; Lack of resources - negative
6. Resource Management (internal & external resources)	Hard work of team; We are never able to get as much end-user interaction as needed; We needed a business analyst at the beginning; Junior developer didn't work out; Not as much end user interaction as needed – positive & negative
7. Project Deliverables (refer to the list of deliverables in the PPM Tool that the PM said would be delivered)	Functionality is adequate; Forms work; Solid tool set for ongoing projects Good start on long term goal; Created a buzz when will I get it Got rid of spreadsheets; Integrated with mainframe; We developed a good interface and design was good; We developed the capability to capture more data – positive
8. Project Cost vs. Budget Cost	We stayed within budget – positive
9. Change Management / Change Request	We were able to adapt as needed - positive
10. Production Readiness (software / hardware, process, personnel)	We developed some effective project management tools; The test and fix process went well; Lack of user testing involvement; Work around solutions excessive; Transition process from Bugzilla to remedy could have been smoother – positive & negative
11. Training (user, admin, etc)	Training was done early and offered often; The training materials were excellent and improved training methods – positive